



FARRELL & JOHNSON PLLC

SPECIAL NEEDS PLANNING DOCUMENT LIST

In these instructions, “you” refers to the person with a disability.

Careful planning to coordinate public benefits with other available resources requires consideration of all your needs and all the resources available to you. Other resources sometimes preclude certain types of public benefit eligibility or require careful planning to avoid disqualification.

Please provide copies of documents with the following information pertaining to you (the person with a disability). If the information is not readily available in documentary form, please provide it in a letter or other writing. However, because agencies administering public benefits always require documentation, and because misidentification of resources or benefits can be easy and costly, please provide copies of documents as soon as possible.

1. *Assets:* Descriptions and values of all assets owned, including without limitation recent statements from financial institutions, deeds, life insurance policies (including statements of cash surrender value if available), employee benefits, etc.
2. *Income:* Sources and amounts of all current and anticipated income, such as Social Security and other public benefits, pensions, annuities, employment income, etc.
3. *Public Benefits and Insurance:* Notices, award letters or other documents showing the sources and amounts of any public benefits presently (or recently) being paid to you, such as Social Security Disability or Retirement, Supplemental Security Income (SSI), Medicaid and/or Medicare eligibility, food stamps, Temporary Assistance to Need Families, and State or local Mental Health and Mental Retardation benefits (such as housing, medical care or social services). Especially, if available, bring any form saying “Medicaid Identification” in the upper right corner; your Medicare card if any; and any other medical insurance cards. Also bring insurance policies and descriptions, including health insurance, disability income insurance, life insurance, etc.
4. *Appointment of Guardian or Agent:* Any relevant order pertaining to the client appointing a guardian or conservator, powers of attorney (financial and health care), order appointing attorney ad litem or guardian ad litem, etc.

5. *Anticipated Recovery or Distribution:* If you are a party to a lawsuit, bring pleadings and/or other documents showing the nature of the claim (including caption showing cause number and court of any personal injury suit, probate application and will, etc.), the amount or estimated amount to be made available to you or for your benefit, and any existing commitments for or anticipated dispositions of the funds.
6. *Other Information Regarding Needs and Resources:* If applicable, provide any other information available to you regarding your needs, mental status and resources, such as the following:
 - a. Written care plans
 - b. Mental status evaluations, orders finding incapacity, etc.
 - c. Anticipated inheritances
 - d. Transfers of property by you for less than adequate consideration in the past 5 years (whether as gifts, for estate planning purposes, or otherwise)
 - e. Other claims and assets you may own that might be pursued through litigation
7. *Contact Information:* Name, address and phone number of any financial consultants or others I may need to contact, especially family members, public benefits eligibility personnel and care managers who may have information affecting you.